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# Alumna Makes Barron's "Top 100 Women Financial Advisors" List

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## **Alumna Makes *Barron's* "Top 100 Women Financial Advisors" List**

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BLOOMINGTON, Ill. – Carol Brandt, Illinois Wesleyan University Class of 1978, was recently recognized as a member of Barron's "Top 100 Women Financial Advisors." In the June 6 issue of the magazine, Brandt was ranked number 64 in the United States.

Brandt, who is also a member of Barron's "Top 1000 Financial Advisors" in the nation, has made the top women financial advisor's list for three years in a row.

"It's a huge honor to be recognized as one of the top women financial advisors in the country," said Brandt. "I'm very excited to be in the company of such a dynamic group of women. Being included on the list provides instant credibility to clients and prospective clients. This also provides increased visibility and credibility within my peer group."



*Carol Brandt*

Barron's, published by Dow Jones & Company since 1921, reports weekly on current American financial information, market developments and relevant statistics. Each year they publish several lists consisting of rankings of the top financial. The list is based on certain criteria: the volume of assets overseen by the advisors and their teams, revenues generated for the firms and the quality of the advisors' practices.

Many of the women manage client accounts that average \$14 million – all of which are owned by investors with an average net worth of \$50 million.

Brandt, who says her clients are very happy for her success, received her bachelor's degree in music education from IWU in 1978. While her job as a financial advisor doesn't relate directly to her undergraduate degree, she says she was able to learn core values at Illinois Wesleyan that are an asset to her job today.

"My job is a relationship business based on core values and trust, which were taught to me by my parents when I was growing up," said Brandt. "These core values were reinforced during my time at Illinois Wesleyan."

After graduating from IWU, Brandt accepted a banking position at LaSalle Bank Chicago.

"I was very fortunate to be chosen for a training class when LaSalle Bank started a bond department," said Brandt. "From the bond department, I transferred to LaSalle Bank's Wealth Management Group."

It was during her time at LaSalle Bank that Brandt completed her MBA in finance at DePaul University in Chicago and obtained her Certified Financial Planner Designation.

By virtue of several mergers, Brandt now works for Merrill Lynch – a financial management and advisory company in Chicago. With over 25 years of experience in the financial industry, she is Senior Vice President and Wealth Management Advisor.

"My goal is to provide peace of mind to my clients," said Brandt. "I take a conservative approach to help them protect the assets they have accumulated. This often involves investing the portion of the portfolio in high-grade bonds, which can provide income and safety of principal."

Over the last three years Brandt has experienced 12 mergers and has been with three organizations due to these mergers. Brandt says these past experiences have helped her learn to embrace change, as well as see it as an opportunity.

"[These mergers] have enabled me to help my clients navigate and adapt to a changing environment," said Brandt. "And to not let short term events derail their long-term goals and dreams."

Along with excelling in her professional career, Brandt has also made a difference with several organizations in the Chicago area. She chaired the LaSalle Women's Network for several years while at LaSalle Bank, and is currently a member of the Lincoln Park Zoo Women's Board.

Brandt, a music education major, was also involved in creating an employee choir during her time at LaSalle Bank. "When I was at LaSalle Bank I founded and directed LaSalle Bank Employee Choir," said Brandt. "We performed the National Anthem for the Chicago Cubs, the White Sox and appeared on NBC and CBS."

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